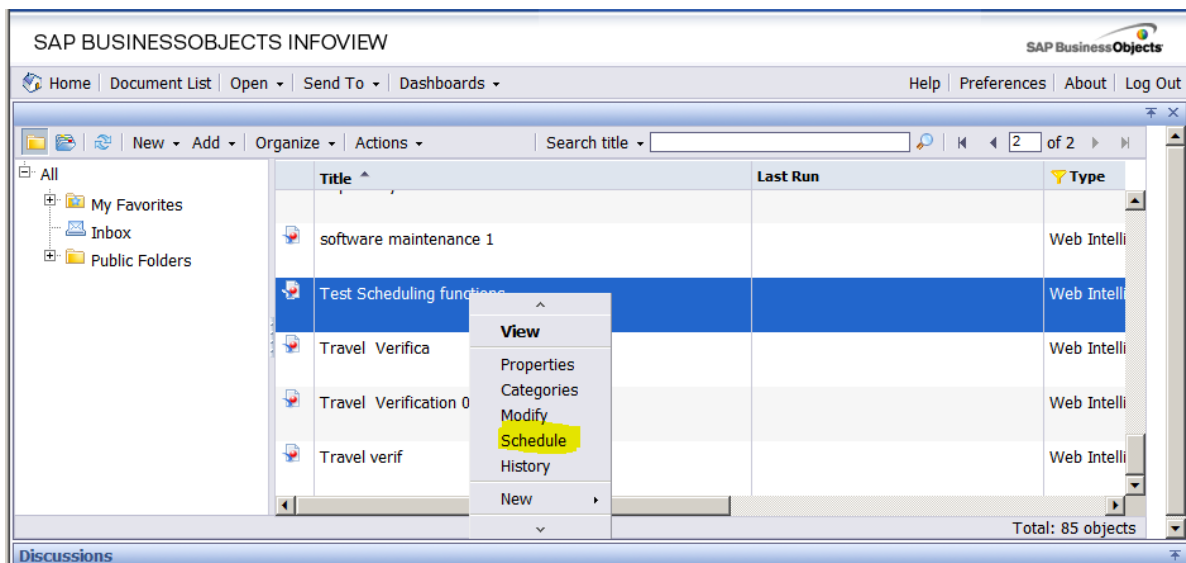


## How to Schedule Reports for Remote Delivery

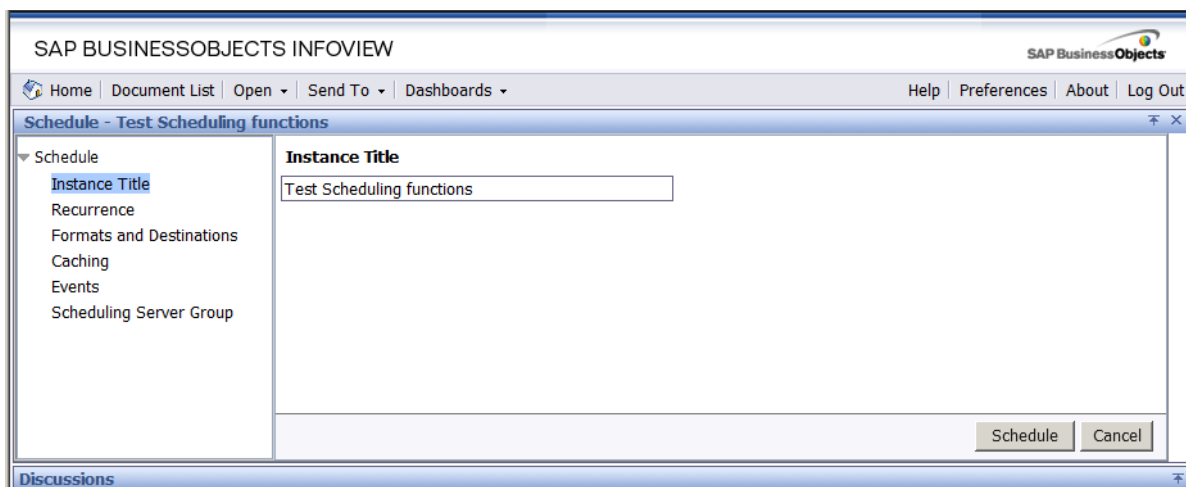
The Scheduling of Objects; including reports, is explained in the BOXI User's Guide found on the Division of Administration, Office of Information Services, Business Objects Logon page. The process can be summarized in these steps:

1. Create and save a report to be scheduled.
2. Right click on the report Title for the "Schedule" option panel.



A Scheduled Report creates an "Instance" of the report each time it runs. If changes need to be made to the Schedule or Destination options it is important to "Replace" existing scheduled reports rather than create a new scheduled version of the original document to prevent duplicate reports running in the system.

Instructions for rescheduling an existing report are at the end of this document.



3. Select your "Recurrence" option to set the frequency of your report.

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Schedule - Test Scheduling functions

▼ Schedule

- Instance Title
- Recurrence**
- Formats and Destinations
- Caching
- Events
- Scheduling Server Group

**Recurrence**

Run object: **Daily**

Object will run

Days(N) = 1

Start Date/Time: 09:05 AM 3/11/2013

End Date/Time: 09:05 AM 3/11/2013

Schedule Cancel

The frequency option will appear based on the option chosen.

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Schedule - Test Scheduling functions

▼ Schedule

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- Formats and Destinations
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- Events
- Scheduling Server Group

**Recurrence**

Run object: **Daily**

Object will run once every N days.

Days(N) = 1

Start Date/Time: 09:05 AM 3/11/2013

End Date/Time: 09:05 AM 3/11/2013

Schedule Cancel

4. The Format and Destinations tab gives the options needed for Remote Delivery of reports. Select your Output Format and Delivery method.

The screenshot shows the 'Schedule - Test Scheduling functions' window in SAP BusinessObjects InfoView. The left sidebar contains a tree view with 'Schedule' expanded, showing sub-items: 'Instance Title', 'Recurrence', 'Formats and Destinations' (selected), 'Caching', 'Events', and 'Scheduling Server Group'. The main content area is titled 'Formats and Destinations' and contains two sections: 'Output Format and Destination' and 'Format Options and Settings'. In the 'Output Format and Destination' section, the 'Output Format' list has 'Comma Separated Values(CSV)' selected. The 'Output Format Details' section shows 'Destinations for Comma Separated Values(CSV) - Test Scheduling functions' with checkboxes for 'Inbox', 'File location', 'FTP server', and 'Email recipients'. The 'Format Options and Settings' section includes dropdowns for 'Text qualifier' (set to '"'), 'Column delimiter' (set to ','), and 'Charset' (set to 'Koi8-r (Cyrillic)'). There are also checkboxes for 'Enter a new charset', 'Set as default values', and 'Generate separate CSV per Data Provider'. At the bottom right, there are 'Schedule' and 'Cancel' buttons. The bottom status bar shows 'Discussions'.

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Schedule - Test Scheduling functions

▼ Schedule

- Instance Title
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**Formats and Destinations**

▼ Output Format and Destination

Output Format

- ☐ Web Intelligence
- ☐ Microsoft Excel
- ☐ Adobe Acrobat
- ☒ Comma Separated Values(CSV)

Output Format Details

Destinations for Comma Separated Values(CSV) - Test Scheduling functions

- ☐ Inbox
- ☐ File location
- ☐ FTP server
- ☐ Email recipients

**Format Options and Settings**

Text qualifier: " " ▼

Column delimiter: , ▼

Charset: Koi8-r (Cyrillic) ▼

☐ Enter a new charset

☐ Set as default values

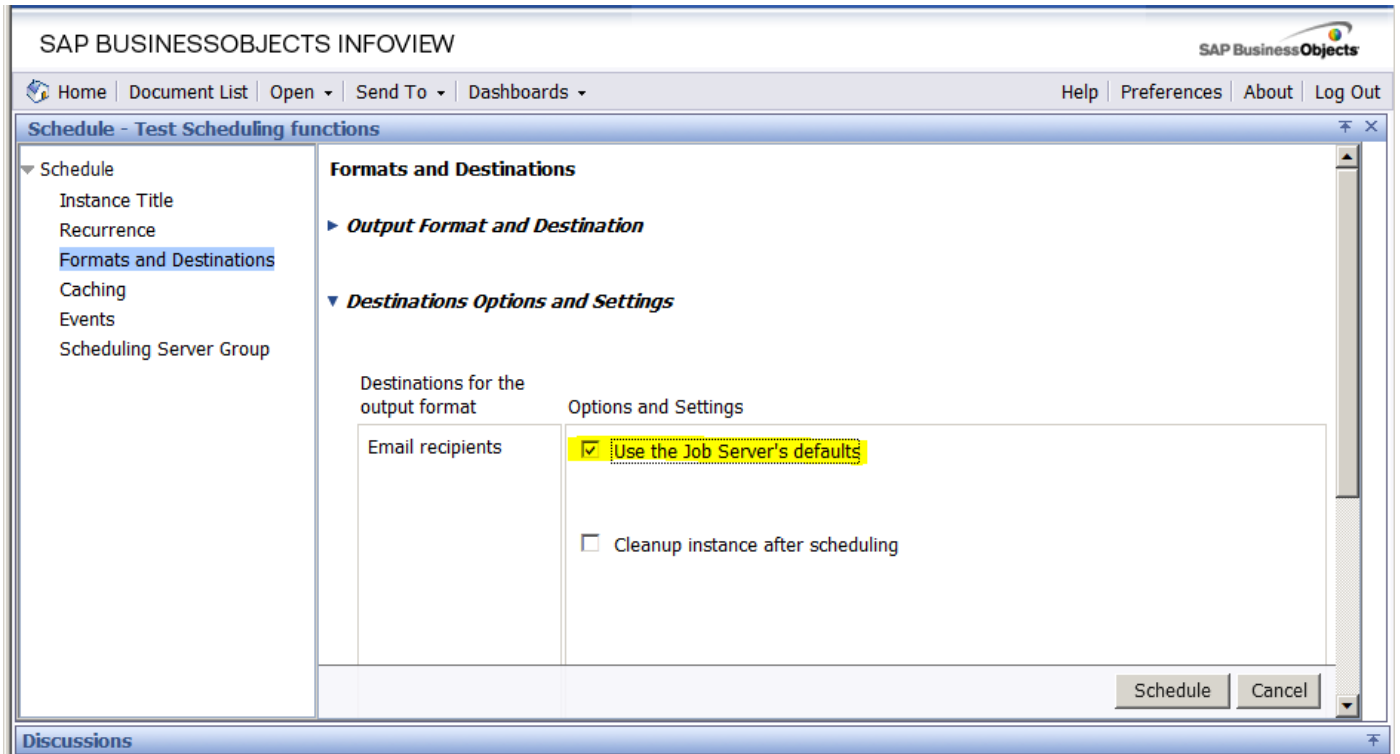
☒ Generate separate CSV per Data Provider

► Destinations Options and Settings

Schedule Cancel

Discussions

De-select the "Use the Job Server's defaults" option in the "Destinations Options and Settings" section.



Your Destination and Output options are presented based on the Delivery Method chosen under "Output Format". Fill in the required fields. Should you decide to change your delivery method; for example from FTP to Email, the "Cancel" button will close the report and return you to the Infoview screen. To go back to Output options, type anything in the required field and click the "Output Format and Destination" section to expand it again.

The "Inbox" option sends your output to a Business Object Inbox.

The screen shows the option needed for Emailing reports outside Business Objects.

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Schedule - Test Scheduling functions

▼ Schedule

- Instance Title
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**Formats and Destinations**

► *Output Format and Destination*

▼ *Destinations Options and Settings*

Destinations for the output format    Options and Settings

Email recipients

☐ Use the Job Server's defaults

From:

To:

Cc:

Subject:

Attachment: ☐ Add attachment

☒ Automatically generated

☐ Specific name:

☐ Add file extension

Message:

☐ Cleanup instance after scheduling

Schedule Cancel

Discussions

Reports may be sent directly to File systems like network shared drives or local PC hard drives if the Business Objects server has access to the network. It is unusual for Business Objects to be able to access these drives with today's firewall restrictions.

The screenshot shows the 'Schedule - Test Scheduling functions' dialog box in SAP BusinessObjects InfoView. The window title is 'SAP BUSINESSOBJECTS INFOVIEW' and the SAP BusinessObjects logo is in the top right corner. The menu bar includes 'Home', 'Document List', 'Open', 'Send To', 'Dashboards', 'Help', 'Preferences', 'About', and 'Log Out'. The left sidebar shows a tree view with 'Schedule' expanded, containing 'Instance Title', 'Recurrence', 'Formats and Destinations' (selected), 'Caching', 'Events', and 'Scheduling Server Group'. The main area is titled 'Formats and Destinations' and contains two sections: 'Output Format and Destination' and 'Destinations Options and Settings'. The 'Destinations Options and Settings' section is further divided into 'Destinations for the output format' and 'Options and Settings'. The 'Destinations for the output format' section has a 'File location' label. The 'Options and Settings' section includes a checkbox for 'Use the Job Server's defaults', a 'Directory:' label with a text box, a 'File name:' label with two radio buttons ('Automatically generated' and 'Specific name:'), a text box for the specific name, a checkbox for 'Add file extension', 'User name:' and 'Password:' labels with text boxes, and a checkbox for 'Cleanup instance after scheduling'. At the bottom right are 'Schedule' and 'Cancel' buttons. The bottom status bar shows 'Discussions'.

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Schedule - Test Scheduling functions

▼ Schedule

- Instance Title
- Recurrence
- Formats and Destinations
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**Formats and Destinations**

► *Output Format and Destination*

▼ *Destinations Options and Settings*

Destinations for the output format

Options and Settings

File location

☐ Use the Job Server's defaults

Directory:

File name:

☒ Automatically generated

☐ Specific name:

☐ Add file extension

User name:

Password:

☐ Cleanup instance after scheduling

Schedule Cancel

Discussions

Reports may be FTP'd to sites configured to accept FTP.

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**Schedule - Test Scheduling functions**

▼ Schedule

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**Formats and Destinations**

► *Output Format and Destination*

▼ *Destinations Options and Settings*

Destinations for the output format

FTP server

Options and Settings

☐ Use the Job Server's defaults

Host:  Directory:

Port:  File name:

User name:  ☒ Automatically generated

Password:  ☐ Specific name:

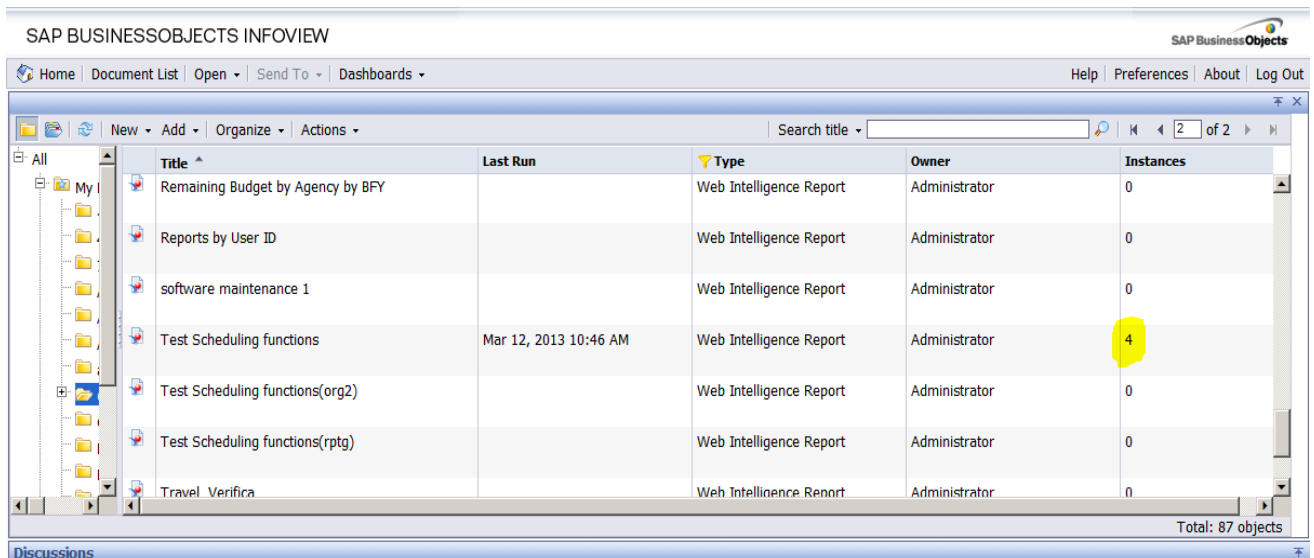
Account:   ☐ Add file extension

☐ Cleanup instance after scheduling

Discussions

## 5. Changing Scheduled Reports:

Scheduled reports will have a number in the “Instances” column.



SAP BUSINESSOBJECTS INFOVIEW

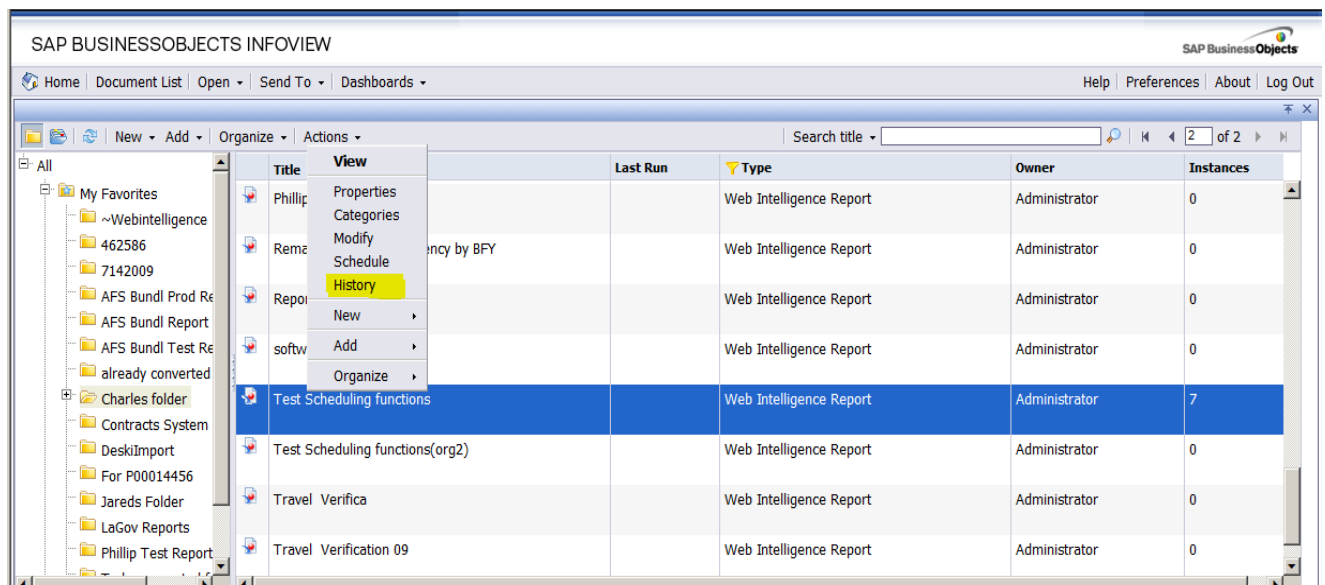
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New | Add | Organize | Actions | Search title | 2 of 2

Title	Last Run	Type	Owner	Instances
Remaining Budget by Agency by BFY		Web Intelligence Report	Administrator	0
Reports by User ID		Web Intelligence Report	Administrator	0
software maintenance 1		Web Intelligence Report	Administrator	0
Test Scheduling functions	Mar 12, 2013 10:46 AM	Web Intelligence Report	Administrator	4
Test Scheduling functions(org2)		Web Intelligence Report	Administrator	0
Test Scheduling functions(rptg)		Web Intelligence Report	Administrator	0
Travel Verifica		Web Intelligence Report	Administrator	0

Total: 87 objects

Right click on the report title and select “History”.



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New | Add | Organize | Actions | Search title | 2 of 2

Title	Last Run	Type	Owner	Instances
Phillip		Web Intelligence Report	Administrator	0
Rema		Web Intelligence Report	Administrator	0
Report		Web Intelligence Report	Administrator	0
softw		Web Intelligence Report	Administrator	0
Test Scheduling functions		Web Intelligence Report	Administrator	7
Test Scheduling functions(org2)		Web Intelligence Report	Administrator	0
Travel Verifica		Web Intelligence Report	Administrator	0
Travel Verification 09		Web Intelligence Report	Administrator	0



The report instance with the status of “Recurring” is the main report that must be adjusted when necessary.

Click the icon on the left end of the line to highlight the “recurring” report.

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History - Test Scheduling functions

Show All Show Completed Show only instances owned by me

Filter Instances By Time

Actions Organize

Instance Time	Title	Run By	Parameters	Format	Status
Mar 12, 2013 2:26 PM	Test Scheduling functions	Administrator		Text	Recurring
Mar 12, 2013 10:46 AM	Test Scheduling functions	Administrator		Text	Success
Mar 11, 2013 11:37 AM	Test Scheduling functions	Administrator		Text	Failed
Mar 11, 2013 11:13 AM	Test Scheduling functions	Administrator		Text	Failed

Use the dropdown arrow next to the word “Actions” to click the “Reschedule” action.

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History - Test Scheduling functions

Show All Show Completed Show only instances owned by me

Filter Instances By Time

Actions Organize

Pause  
Resume  
Reschedule

Instance Time	Title	Run By	Parameters	Format	Status
Mar 12, 2013 2:26 PM	Test Scheduling functions	Administrator		Text	Recurring
Mar 12, 2013 10:46 AM	Test Scheduling functions	Administrator		Text	Success
Mar 11, 2013 11:37 AM	Test Scheduling functions	Administrator		Text	Failed
Mar 11, 2013 11:13 AM	Test Scheduling functions	Administrator		Text	Failed

Select the option of “Replace” for recurring reports.

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Reschedule - Test Scheduling functions

Reschedule

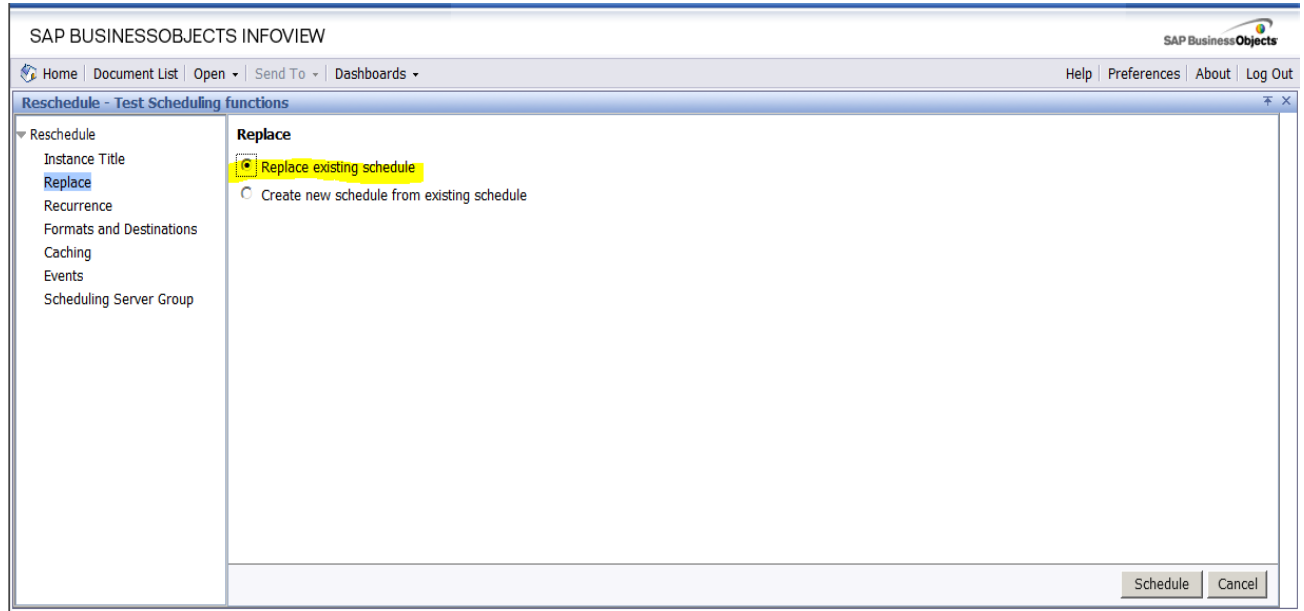
- Instance Title
- Replace
- Recurrence
- Formats and Destinations
- Caching
- Events
- Scheduling Server Group

Instance Title: Test Scheduling functions

Schedule Cancel

Discussions

Select the "Replace existing schedule" option to ensure duplicate reports will not be scheduled in Business Objects.



Press "Schedule" after your other changes are complete. You should pull up your report again using the "History" option to check that only 1 report appears with a status of "Recurring".